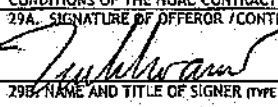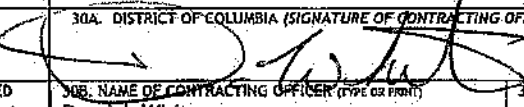| GOVERNMENT OF THE DISTRICT OF COLUMBIA TASK ORDER/DELIVERY ORDER FOR SERVICES OFFEROR TO COMPLETE BLOCKS 18 & 29			1.REQUISITION NUMBER	PAGE 1 of 12

2. TASK ORDER AGREEMENT NO. CW73403	3. Award/Effective Date See 30C	4. CONTRACT NUMBER GS-35F-088CA	5. SOLICITATION NUMBER	6. SOLICITATION ISSUE DATE

7. FOR SOLICITATION INFORMATION CONTACT Email: Georgette.Johnson@dc.gov	A. NAME Georgette Johnson	B. TELEPHONE (No Collect Calls) 202.727.1104	8.OFFER DUE DATE:

9. ISSUED BY

Office of Contracting and Procurement
Information Technology Group
441 4TH Street NW, Suite 330 S
Washington, D.C. 20001

10. THIS ACQUISITION IS

☐ UNRESTRICTED
☐ SET ASIDE %FOR
☐ SMALL BUSINESS
☐ SMALL DISADV. BUS.
☒ DCSS

SIC:
SIZE STANDARD:

11. DELIVERY FOR FOB DESTINATION UNLESS BLOCK IS MARKED
☒ N/A

☐ 13. RESERVED

14. METHOD OF SOLICITATION

☒ RFTOP ☐ RFQ ☐ IFB ☐ RFP ☐ 2-STEP

12. PAYMENT DISCOUNT TERMS
Net 30 days

5. CONTRACTOR / OFFEROR
Advanced Network Consulting, Inc.
1200 G ST NW, Suite 806
Washington, D.C. 20005

16. PAYMENT WILL BE MADE BY CODE
Office of the Chief Technology Officer
200 I Street SE 5th Floor
Washington, D.C. 20003

15A DUNS NO.	15B TAX ID NO.

17. DELIVER TO
Office of the Chief Technology Officer
200 I Street SE 5th Floor
Washington, D.C. 20003

18. ADMINISTERED BY
Office of the Chief Technology Officer
200 I Street SE 5th Floor
Washington, D.C. 20003

18A. CHECK IF REMITTANCE IS DIFFERENT AND PUT SUCH ADDRESS IN OFFER
☐

18B. SUBMIT INVOICES TO ADDRESS SHOWN IN BLOCK 16 UNLESS BLOCK BELOW IS CHECKED
☐ SEE ADDENDUM

19 ITEM NO.	20 SCHEDULE OF SUPPLIES/SERVICES	21 QUANTITY	22 UNIT	23 UNIT PRICE	24 AMOUNT
0001 0003	Conduct an Information Technology Financial Management (ITFM) Capability Maturity Assessment. See Attachment B.	1	Lot	--------	$908,569.61

25. ACCOUNTING AND APPROPRIATION DATA PURCHASE ORDER NO.	26. TOTAL AWARD (FOR GOVT. USE ONLY) $908,569.61

27. CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN ONE COPY TO THE ISSUING OFFICE. CONTRACTOR AGREES TO FURNISH AND DELIVER ALL ITEMS SET FORTH OR OTHERWISE IDENTIFIED ABOVE AND ON ANY ADDITIONAL PAGES SUBJECT TO THE TERMS AND CONDITIONS SPECIFIED HEREIN. THIS ORDER IS ISSUED SUBJECT TO THE TERMS AND CONDITIONS OF THE HGAC CONTRACT IDENTIFIED IN BLOCK 4.	28. THE FOLLOWING DOCUMENTS ARE INCORPORATED BY REFERENCE INTO THIS TASK ORDER IN THE FOLLOWING PRIORITY: THIS TASK ORDER IS SUBJECT TO THE TERMS AND CONDITIONS OF THE GSA CONTRACT IDENTIFIED IN BLOCK 4.
29A. SIGNATURE OF OFFEROR / CONTRACTOR	30A. DISTRICT OF COLUMBIA (SIGNATURE OF CONTRACTING OFFICER)
29B. NAME AND TITLE OF SIGNER (TYPE OR PRINT) HOANG TRINH, President	29C. DATE SIGNED 8/6/19	30B. NAME OF CONTRACTING OFFICER (TYPE OR PRINT) Derrick White Chief Contracting Officer	30C DATE SIGNED 8/8/19

1. **SERVICES REQUIRED**

The District of Columbia Office of Contracting and Procurement, on behalf of the Office of the Chief Technology Officer (OCTO) is seeking a contractor to conduct an Information Technology Financial Management (ITFM) Capability Maturity Assessment to ensure proper alignment and scope of a potential Technology Business Management (TBM) implementation.

2. **FEDERAL SUPPLY SCHDULE CONTRACT NUMBER**

GS-35F-088CA

3. **TASK ORDER NUMBER**

CW73403

4. **TERM OF CONTRACT**

The base period of performance shall be one year from the date of Award.

4.1 **OPTION TO EXTEND THE TERM OF THE CONTRACT**

4.1.1 The District may extend the term of this contract for a period of one (1), one (1) year option periods, or successive fractions thereof, by written notice to the Contractor before the expiration of the contract; provided that the District will give the Contractor preliminary written notice of its intent to extend at least thirty (30) days before the contract expires. The preliminary notice does not commit the District to an extension. The exercise of this option is subject to the availability of funds at the time of the exercise of this option. The Contractor may waive the thirty (30) day preliminary notice requirement by providing a written waiver to the Contracting Officer prior to expiration of the contract.

4.1.2 If the District exercises this option, the extended contract shall be considered to include this option provision.

4.1.3 The price for the option period(s) shall be as specified in the Attachment B of the task order contract.

4.1.4 The total duration of this contract, including the exercise of any options under this clause, shall not exceed two (2) years, but, in no event shall the term of this Task Order extend beyond the expiration date of the contract number identified on page 1, box 4.

5. **CONTRACTING OFFICER (CO)**

Contracts may be entered into and signed on behalf of the District Government only by Contracting Officers. The name, address and telephone number of the Contracting Officer for this task order is:

Derrick White
Office of Contracting and Procurement
441 4th Street N.W., Suite 330
Washington, D.C. 20003
Office: 202.724.5278
E-mail: Derrick.White@dc.gov

5.1 AUTHORIZED CHANGES BY THE CONTRACTING OFFICER

5.1.1 The CO is the only person authorized to approve changes in any of the requirements of this contract.

5.1.2 The Contractor shall not comply with any order, directive or request that changes or modifies the requirements of this contract, unless issued in writing and signed by the CO.

5.1.3 In the event the Contractor effects any change at the instruction or request of any person other than the CO, the change will be considered to have been made without authority and no adjustment will be made in the contract price to cover any cost increase incurred as a result thereof.

6. **CONTRACTS ADMINISTRATOR (CA)**

6.1 The CA is responsible for general administration of the contract and advising the CO as to the Contractor's compliance or noncompliance with the contract. The CA has the responsibility of ensuring the work conforms to the requirements of the contract and such other responsibilities and authorities as may be specified in the contract. These include:

6.1.1 Keeping the CO fully informed of any technical or contractual difficulties encountered during the performance period and advising the CO of any potential problem areas under the contract;

6.1.2 Coordinating site entry for Contractor personnel, if applicable;

6.1.3 Reviewing invoices for completed work and recommending approval by the CO if the Contractor's costs are consistent with the negotiated amounts and progress is satisfactory and commensurate with the rate of expenditure;

6.1.4 Reviewing and approving invoices for deliverables to ensure receipt of goods and services. This includes the timely processing of invoices and vouchers in accordance with the District's payment provisions; and

6.1.5 Maintaining a file that includes all contract correspondence, modifications, records of inspections (site, data, and equipment) and invoice or vouchers.

6.2   The address and telephone number of the CA is:

        Tehsin Faruk
        Office of the Chief Technology Officer
        200 I Street, S.E. Fifth Floor
        Washington, D.C. 20003
        Office: (202) 715-3735
        Email: tehsin.faruk@dc.gov

6.3   The CA shall NOT have the authority to:

        1. Award, agree to, or sign any contract, delivery order or task order. Only the CO shall make contractual agreements, commitments or modifications;
        2. Grant deviations from or waive any of the terms and conditions of the contract;
        3. Increase the dollar limit of the contract or authorize work beyond the dollar limit of the contract;
        4. Authorize the expenditure of funds by the Contractor;
        5. Change the period of performance; or
        6. Authorize the use of District property, except as specified under the contract.

6.4   The Contractor will be fully responsible for any changes not authorized in advance, in writing, by the CO; may be denied compensation or other relief for any additional work performed that is not so authorized; and may also be required, at no additional cost to the District, to take all corrective action necessitated by reason of the unauthorized changes.

6.5   The Contract Administrator will provide data sets to the Contractor during this engagement in order for them to effectively complete the ITFM Assessment. The Contract Administrator will facilitate with the following:
        1. Scheduling Interviews With Stakeholders;
        2. Gathering Data Sets;
        3. Holding Stakeholder Follow-up Meetings; and
        4. Executive Report-out

7.   ORDERING CLAUSE

7.1   Any supplies and services to be furnished under this contract must be ordered by issuance of delivery orders or task orders by the CO. Such orders may be issued during the term of this contract.

7.2   All delivery orders or task orders are subject to the terms and conditions of this contract. In the event of a conflict between a delivery order or task order and this contract, the contract shall control.

7.3   If mailed, a delivery order or task order is considered "issued" when the District deposits the order in the mail. Orders may be issued by facsimile or by electronic commerce methods.

8. INVOICE PAYMENT

8.1 The District will make payments to the Contractor, upon the submission of proper invoices, at the prices stipulated in this contract, for supplies delivered and accepted or services performed and accepted, less any discounts, allowances or adjustments provided for in this contract.

8.2 The District will pay the Contractor on or before the 30th day after receiving a proper invoice from the Contractor.

8.3 The District follows a specific policy for services related to software/hardware (SW/HW) maintenance/licenses and support services. These services must be provided and billed within the District's fiscal year (October 1 to September 30). Invoices should only cover one fiscal year and the District cannot be held liable for any such services not billed and paid with in the same fiscal year (October 1 to September 30). The District issues separate payment for each fiscal year for accounting and budgetary reasons.

8.4 By accepting this contract, for SW/HW maintenance/licenses and support services, you agree that a proper invoice constitutes a service period that covers ONLY October 1 through September 30.

9. INVOICE SUBMITTAL

9.1 The Contractor shall create and submit payment requests in an electronic format through the DC Vendor Portal, https://vendorportal.dc.gov.

9.2 The Contractor shall submit proper invoices on a monthly basis or as otherwise specified in Section 10.

9.3 To constitute a proper invoice, the Contractor shall enter all required information into the Portal after selecting the applicable purchase order number which is listed on the Contractor's profile.

10. PAYMENTS

Unless otherwise specified in this contract, payment will be made on partial deliveries of goods and services accepted by the District if:
1. The amount due on the deliveries warrants it; or
2. The Contractor requests it and the amount due on the deliveries is in accordance with the following:
   a. Payment will be made on completion and acceptance of each item for which the price is stated in the Attachment B; and
3. Presentation of a properly executed invoice.

Attachment A
Statement of Work

A.1   **SCOPE:**

The District of Columbia Office of Contracting and Procurement, on behalf of the Office of the Chief Technology Officer (OCTO) is seeking a contractor to conduct an IT Financial Management (ITFM) Capability Maturity Assessment to ensure proper alignment and scope of a potential Technology Business Management (TBM) implementation.

Upon completion of the assessment the contractor shall be required to implement ServiceNow, ITSM platform based on industry best practices.

A.2   **APPLICABLE DOCUMENTS**

The following documents are applicable to this procurement and are hereby incorporated by this reference:

Item No.	Document Type	Title	Date

A.3   **DEFINITIONS/ ACRONYMS**

1. IT Financial Management (ITFM)
2. Technology Business Management (TBM)
3. Information Technology Service Management (ITSM)

A.4   **BACKGROUND**

The Office of the Chief Technology Officer (OCTO) is the agency responsible for the oversight, implementation and operation of the information technology (IT) portfolio of the District of Columbia Government. The mission of OCTO is to improve the quality and reduce the cost of District of Colombia government services by directing the strategy, deployment and management of IT with an unwavering commitment to customer service, efficiency, value and security.

Through this implementation of the financial modelling leveraging ServiceNow FM Module. The agency is looking to create efficiencies and improve the following processes:

1. OCTO is funded through four key methods of Local, Assessment, Capital, and MOU – simplify the process of fund documentation and usage
2. Current budgeting and tracking processes are managed through excel templates
3. OCTO leadership and Service Owners would like better visibility into the costs that drive their services
4. OCTO consumers would like better visibility into their Assessment and MOU drivers

A.5   REQUIREMENTS

A.5.1 The Contractor shall provide the deliverables in three (3) broad phases. The phases will be initiated upon project initiation request made by the agency.

1. Phase I-Financial Assessment and ITFM System Recommendation
2. Phase II-Develop and Implement Service Now Financial Model (FM) Cost model
3. Phase III-Develop and Implement ServiceNow for the following instances:
    a) Incident Management
    b) Service Portal Design and Custom Widget Development
    c) Catalog Item Build (Service Requests)
    d) Knowledge Management
    e) Asset Management
    f) Virtual Agent

A.5.1.1 The Contractor shall provide a team of personnel with the following experience when the District deems it applicable:

Certification	Primary Duties	Experience
Certified CSA, CIS, ITILv3	Overall design and delivery assurance	• 3+ years ServiceNow platform experience • 3+ years ITSM experience • 3+ years ServiceNow implementation experience
Certified CSA	Project engagement manager and primarily escalation contact	• 1+ year ServiceNow platform experience • 2+ year Project Management experience
Certified CSA, CIS - ITSM, ITILv3	Process documentation, assessment, and process design/consulting	• 1+ years ServiceNow platform experience • 1+ years ITSM experience
Certified CSA, CIS - ITSM	Platform development	• 1+ years ServiceNow platform experience • 1+ years ITSM experience
Certified CSA, CIS - ITSM	Program Management and secondary escalation	• 3+ years ServiceNow platform experience • 1+ years ServiceNow implementation experience

A.5.1.2The contractor shall posses past experience with implementing an ITFM, TBM and/or IT Service Management (ITSM) solution within the ServiceNow Platform.

A.5.1.3The contractor shall be an authorized vendor with the ability to provide the Value Insights® Services as provided by Proven IT Finance.

A.5.2 Phase I:

A.5.2.1The Contractor shall provide a detailed outline of a series of sprints and project plan in order to deliver a comprehensive assessment for Phase I to include:

1. An Assessment of the Current State of IT Financial Management capabilities:
   a) Identify Stakeholders;
   b) Schedule Stakeholder Meetings; and
   c) Define Targeted Data Sets.

2. Identification of potential gaps against Industry Best Practices and provide:
   a) Recommendations for each of the ITFM practice areas; and
   b) ITFM System Recommendations

3. Delivery of an Assessment Report & Recommendation. The data assessment outputs should include:
   a) Overview of Data Capabilities
   b) Capability Descriptions;
   c) Observations; and
   d) High-level Recommendation(s).
   e) Assessment Outcomes
   f) Detailed descriptions of the data elements that will be rated/assessed; and
   g) Criteria rating.
   h) Detailed Recommendations
   i) Observations; and
   j) Recommendations for improvement(s).

A.5.2.2The Contractor shall perform the activities outlined above by analyzing OCTO's cost drivers including the existing IT portfolio and services offered to the District and provide an overall value proposition and assess how OCTO compares to industry standards and proven success models.

A.5.2.3The Contractor shall provide clear and precise direction on which capability improvements or additions will generate the best return for OCTO.

A.5.2.4The Contractor shall provide a defined ITFM governance framework designed for assessing, building, and maturing agencies utilizing ITFM and TBM practices.

A.5.2.5The Contractor's engagement methodology must be optimized and based on the following approach:
   1. Grounded in industry best practices;
   2. Aligned to common standards; and
   3. Validated through successful implementations.

The scope of this assessment will cover all ITFM practice areas and will focus on key capabilities required for the District Government's potential implementation of a mature ITFM capability.

A.5.2.6 The Contractor shall provide a Model and Team to:
1. To maximize the quality and capability of financial reporting within OCTO;
2. The project is estimated to require 4 weeks with 2 visits onsite
3. Onsite team shall consist of a Lead Strategist, up to two Senior Consultants and Support personnel Offsite support team shall include a Subject Matter Expert, a Data Analyst and a Project Coordinator.

A.5.2.7 The Contractor shall provide past performance documentation showing a successful ITFM, TBM and/or ITSM assessment and implementation utilizing the ServiceNow Platform. This documentation should consist of customer evaluation of services performed in relation to the effort described within this document.

A.5.2.8 The Contractor is required during Phase I to provide a project kick off plan to include:
1. Project Kick-off & Scope Confirmation;
2. Stakeholder Interviews;
3. Consolidate Stakeholder Profiles;
4. Consolidate ITFM Practice Reviews;
5. Analyze Assessment and Create Heatmap;
6. Recommendation and Roadmap Deliverable; and
7. Final Executive Review.

A.5.3 Phase II

A.5.3.1 The Contractor shall provide a detailed and comprehensive implementation scope leveraging ServiceNow and the ServiceNow FM module to automate the agency's annual Assessment process and Memorandum of Understanding (MOU) creation.

A.5.3.2 The Contractor shall also implement a cost model and the FM module to facilitate the Assessment and MOU process.

A.5.3.3 The Contractor shall focus on the following target outcomes:
1. Identify budget dollars for services recovered through the Assessment;
2. Identify consumption metrics related to each service recovered through the Assessment;
3. Identify dollars for services to be recovered through the MOU;
4. Identify consumption metrics related to each service recovered through the MOU;
5. Build the cost model within the ServiceNow FM module;
6. Create and publish Performance Analytics Dashboards for Assessment and MOU related activities; and
7. Documentation of processes, business rules, and basic usage of the ServiceNow FM module.

A.5.3.4 The Contractor shall focus on implementing a ServiceNow FM cost model to facilitate and support the Assessment and MOU budget process and leverage ServiceNow to automate the Assessment and MOU budget process.

A.5.3.5 The Contractor shall provide the following in Phase II:

1. Develop and implement Assessment/MOU cost model in ServiceNow FM
2. Identify required data sources and generate required upload tables in ServiceNow
3. Leverage ServiceNow workflow and forms to automate Assessment and MOU processes and approvals
4. Generate dashboards for three (3) stakeholder groups –
   a) Service Owners,
   b) IT Leadership,
   c) Assessment/MOU team
5. Generate output for show back to consumers
6. Documentation of development and operations

A.5.3.6 The Contractor shall provide a detailed Deployment Schedule for the following activities.

Activity	Activity Details	Deliverables
Initiate	- Meeting with project team to clarify scope, set expectations - Coordinate meetings - Clarify/begin artifact collection - Finalize Resources	Detailed project plan Onsite plan identifying interviews and calendar Artifacts list and review plan
Analyze & Design	- Gather requirements – Cost Model, Services, Data, Dashboards - Create Documentation - Create Solution Design	Technical Design Document Business Requirements Document
Iterative Build	- Iterative configuration – Cost Model and data tables - Configure Dashboards - Write Technical documentation	Cost Models configured in ServiceNow (sub prod) Dashboards live in ServiceNow (sub prod) Technical Documentation
Deploy	Complete test cases for cost model, data tables, and dashboards	Documentation of testing output
Operate	- Migrate to Production - Upload monthly data files into ServiceNow - Run the cost model in ServiceNow - Populate the ServiceNow Dashboards	Model is run within Production environment of ServiceNow Stakeholder Dashboards are available online in ServiceNow on a set business day each month

C.5.4 Phase III

A.5.4.1 The Contractor shall develop and Implement ServiceNow for the following instances:
1. Incident Management
2. Service Portal Design and Custom Widget Development
3. Catalog Item Build (Service Requests)
4. Knowledge Management
5. Asset Management
6. Virtual Agent

A.5.4.2 The Contractor shall focus on implementing a ServiceNow instances to facilitate with speed of delivery ok key services with better efficiency and lower costs.

A.5.4.3 Contractor shall provide three onsite resources to provide support from 8:00AM to 5:30 PM EST.

A.5.4.4 The Contractor shall conduct an onsite project Kick off and provide the agency with Pre-Set Schedules that will be accomplished in 4/55 sprints:
1. Incident Management
2. Service Portal Design and Custom Widget Development
3. Catalog Item Build (Service Requests)
4. Knowledge Management
5. Asset Management
6. Virtual Agent

A.5.4.5 The Contractor shall provide a team of personnel with the following experience:

Certification	Primary Duties	Experience
Certified CSA, CIS, ITILv3	Overall design and delivery assurance	• 3+ years ServiceNow platform experience • 3+ years ITSM experience • 3+ years ServiceNow implementation experience
Certified CSA	Project engagement manager and primarily escalation contact	• 1+ year ServiceNow platform experience • 2+ year Project Management experience
Certified CSA, CIS - ITSM, ITILv3	Process documentation, assessment, and process design/consulting	• 1+ years ServiceNow platform experience • 1+ years ITSM experience
Certified CSA, CIS - ITSM	Platform development	• 1+ years ServiceNow platform experience • 1+ years ITSM experience
Certified CSA, CIS - ITSM	Program Management and secondary escalation	• 3+ years ServiceNow platform experience • 1+ years ServiceNow implementation experience

Attachment B
Price Schedule

B.1 Base Year

B.1.1 Phase I: IT Financial Assessment and ITFM System Recommendation

Contract Line Item Number (CLIN)	Labor Category	Estimated Hours	Rate per hour	Ext Estimated Price
0001	Program Manager	120	$149.50	$17,940.00
0002	Senior Consultant	512	$179.81	$92,062.72
0003	Enterprise Architect	517	$165.43	$85,527.31
			Total	$195,530.03

B.1.2 Phase II: Financial Management

Contract Line Item Number (CLIN)	Labor Category	Estimated Hours	Rate per hour	Ext Estimated Price
0004	Program Manager	171	$149.50	$25,564.50
0005	Senior Consultant	820	$179.81	$147,444.20
0006	Enterprise Architect	816	$165.43	$134,990.88
			Total	$307,999.58

B.1.3 Phase III: ServiceNow Implementation

Contract Line Item Number (CLIN)	Labor Category	Estimated Hours	Rate per hour	Ext Estimated Price
0007	Program Manager	400	$149.50	$59,800.00
0008	Senior Consultant	1000	$179.81	$179,810.00
0009	Enterprise Architect	1000	$165.43	$165,430.00
			Total	$405,040.00
			Base Year Total	$908,569.61

B.2 Option Year 1

Contract Line Item Number (CLIN)	Labor Category	Estimated Hours	Rate per hour	Ext Estimated Price
1001	Maintenance and Support	400	$149.50	$59,800.00
			Total	$59,800.00